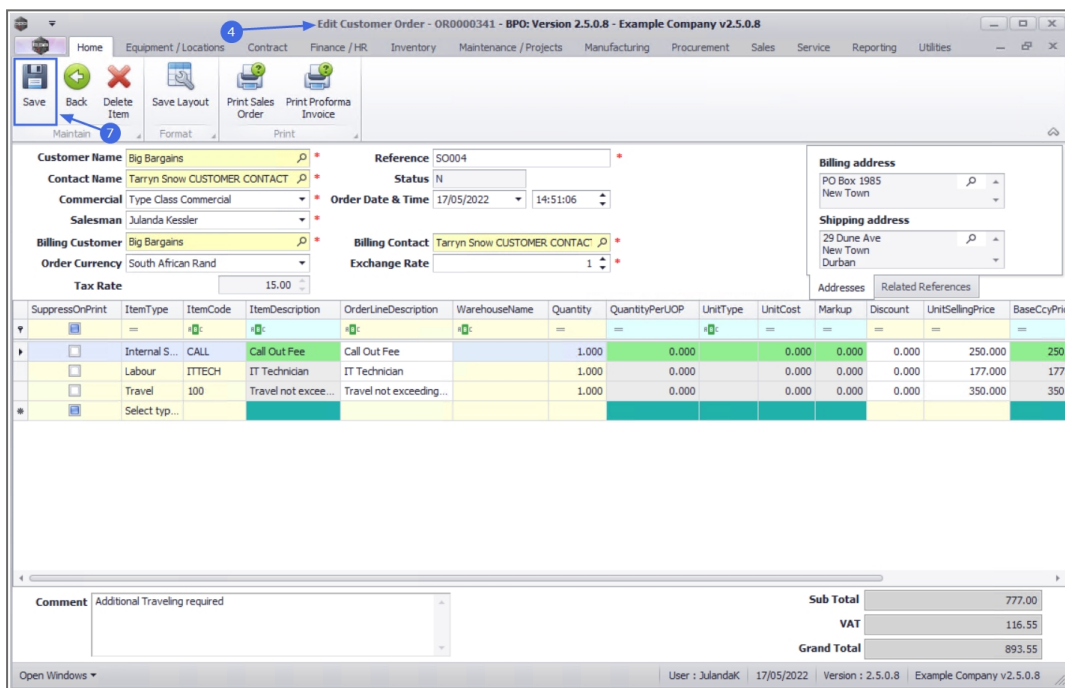


# SERVICE

## CALLS - ADD A SALES ORDER

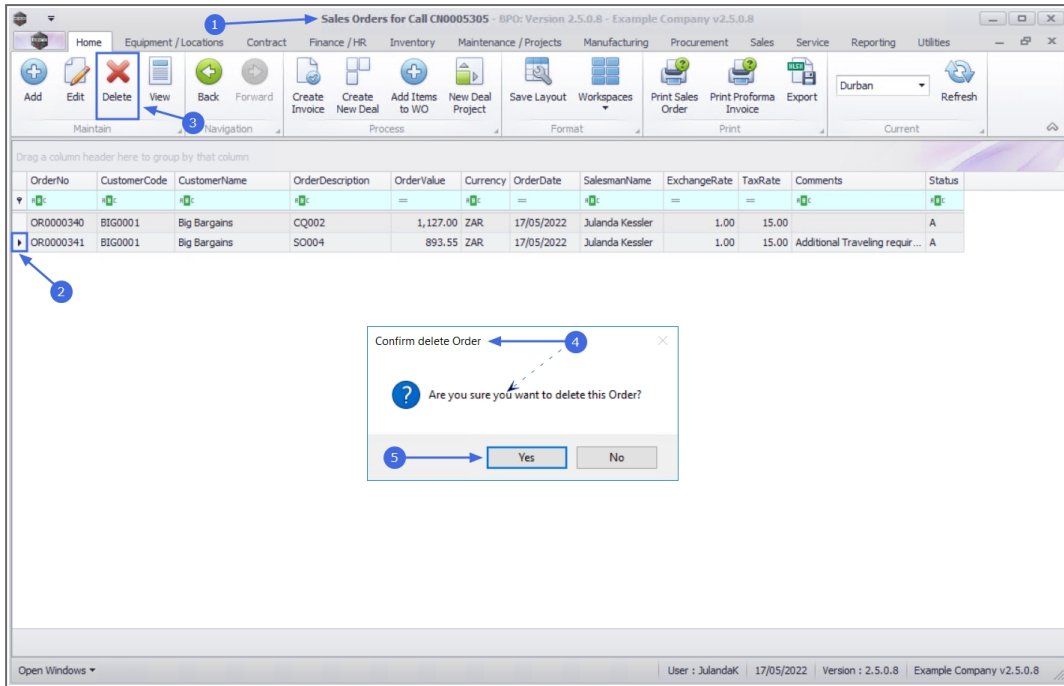
After a quote for additional work on a call has been **approved** by the client - this quote will need to be converted to a **Sales Order** to start the procurement process for the parts and/or services.

Ribbon Access: *Service > Calls*



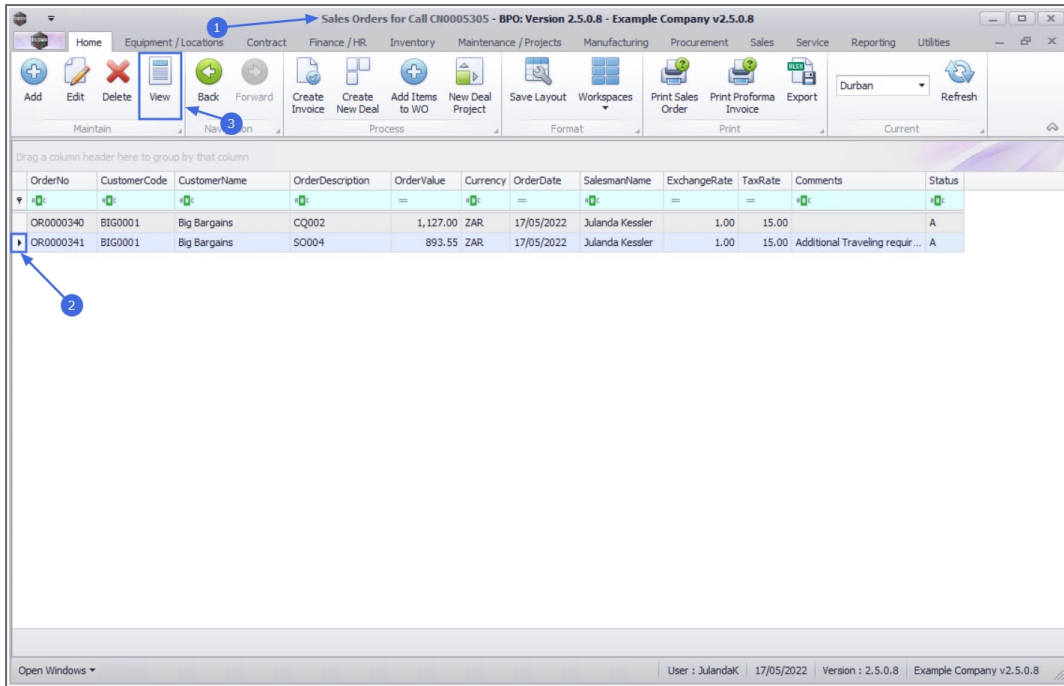
The **Call Listing** screen will be displayed.

- Select the **site** and **status**.
  - In this image, **Durban** has been selected as the site and the status has been set to **New**.



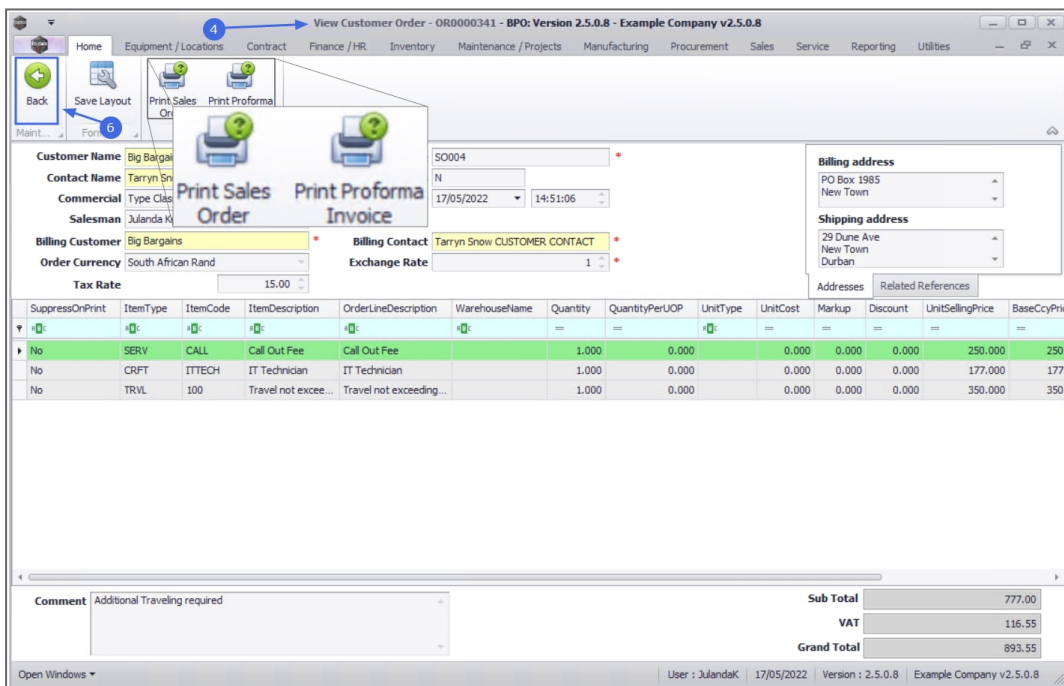
## ADD SALES ORDER

- Click on the **row selector** in front of the **call** you wish to log a **sales order** for.
- Click on **Edit**.



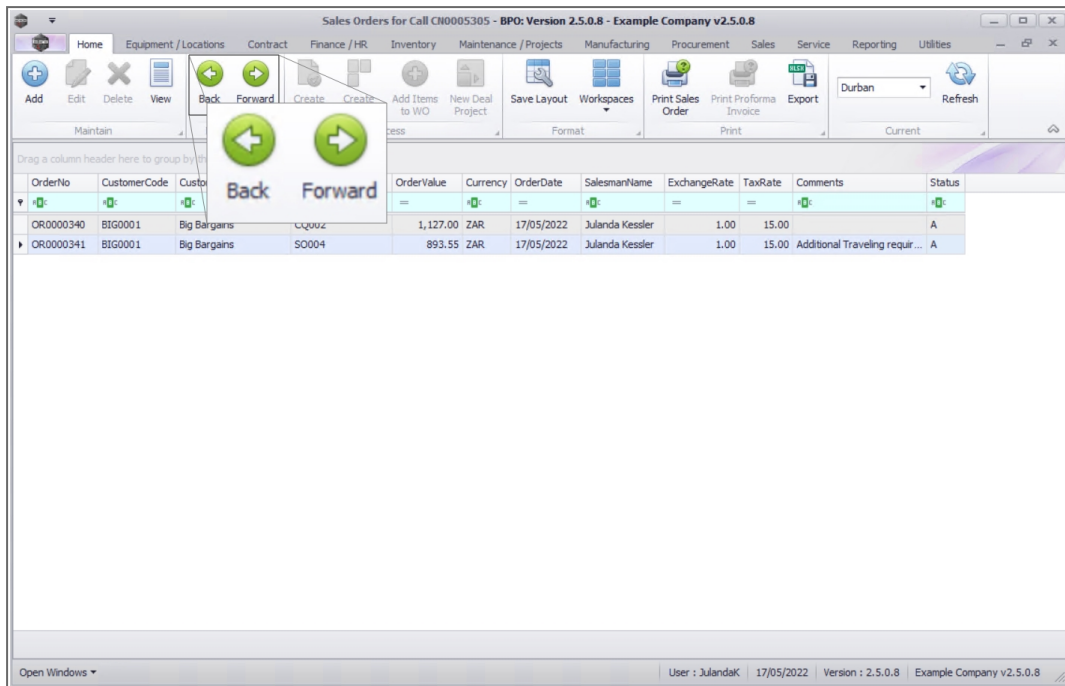
The **Call maintenance: Call ref. - [ ]** screen will be displayed.

- Click on the **Orders** tile.



The **Sales Orders for Call [ ]** screen will be displayed.

- Click on **Add**.

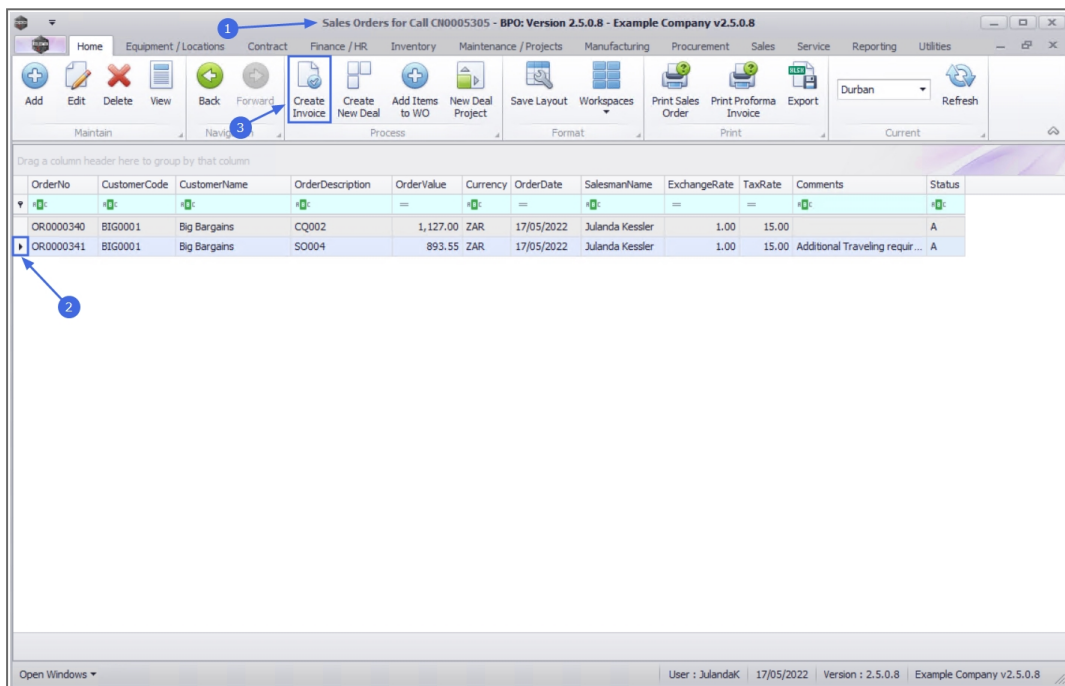


The **Add new Customer Order** screen will be displayed.

## CUSTOMER INFO

- **Customer Name:** This will auto populate with the customer linked to this call.
- **Contact Name:** This will auto populate with the contact linked to this call but you can click on the search button and select an alternative contact if required.
- **Commercial:** This is the default commercial as configured on the customer. A different commercial can be selected if required.
- **Salesman:** This will auto populate with the person currently creating the invoice but you can click on the search button and select an alternative salesman if required.

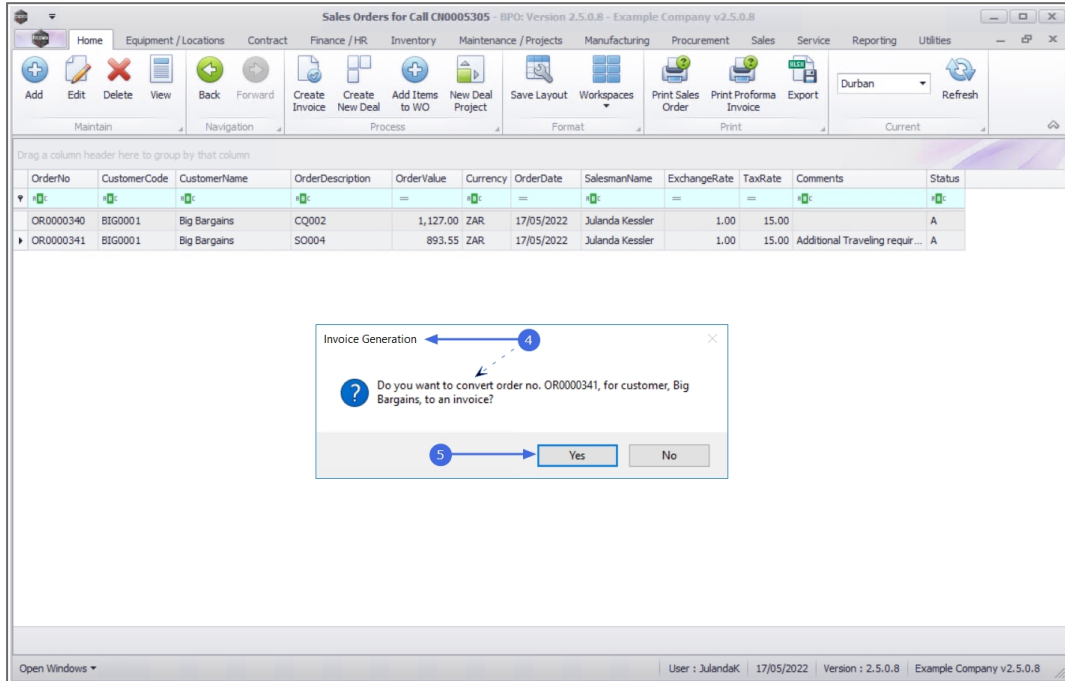
- **Reference:** Type in a reference for the invoice.
- **Status:** This will auto populate as New.
- **Date and Time:** These will auto populate with the current date and time but
  - You can either type in or click on the drop down arrow and use the calendar function to select an alternative date if required.
  - You can either type in or use the arrow indicators to select an alternative time if required.



## BILLING INFO

- **Billing Customer:** Click on the search button and select the billing customer.
- **Billing Contact:** Click on the search button and select the billing contact.

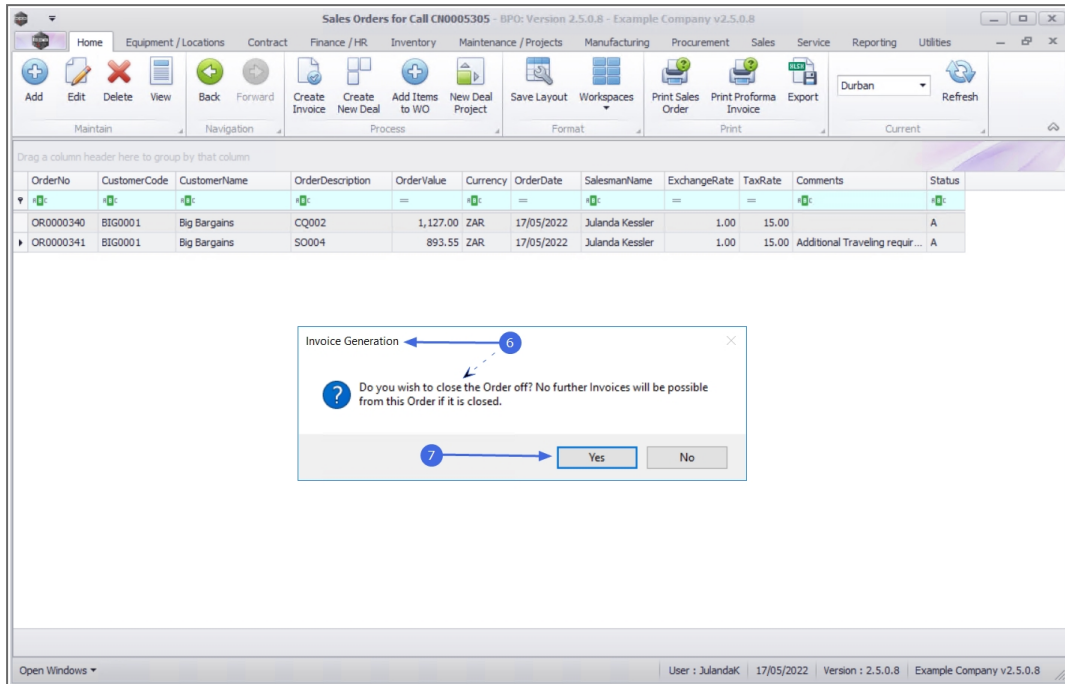
- **Note:** The Main customer is the customer where the machine is located. The Billing customer is the customer who is paying for this invoice.



## FINANCIAL INFO

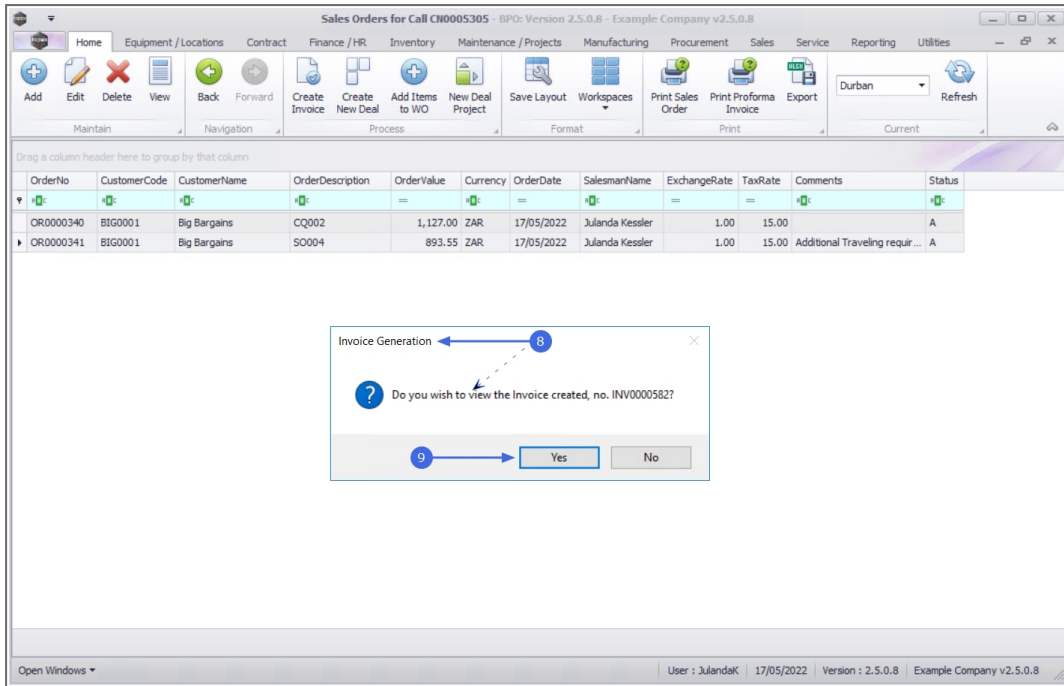
- **Order Currency:** This will populate based on the currency set up on the customer. Use the drop down arrow to display the currency menu and select a different currency if required.
- **Tax Rate:** This will populate based on the tax rate set up on the customer. Type in or use the directional arrows to select a new rate if required.
- **Exchange Rate:** This will populate based on the exchange rate set up in the system. Type in or use the

directional arrows to select a new exchange rate if required.



## ADDRESSES

- Click on the **Addresses** tab.
  - **Billing Address:** Ensure that the billing address is populated, if not, click on the search button and select the billing address.
  - **Shipping Address:** Ensure that the shipping address is populated, if not, click on the search button and select the shipping address.



## RELATED REFERENCES

- Click on the **Related References** tab.
  - This will display all the reference numbers linked to this invoice.
  - In this image you can see that in this order, the initial **Call no.** is linked to it as well as a linked **Serial no.** and **Contract no.**
  - **Scroll down** in this panel to view all of the related reference numbers.

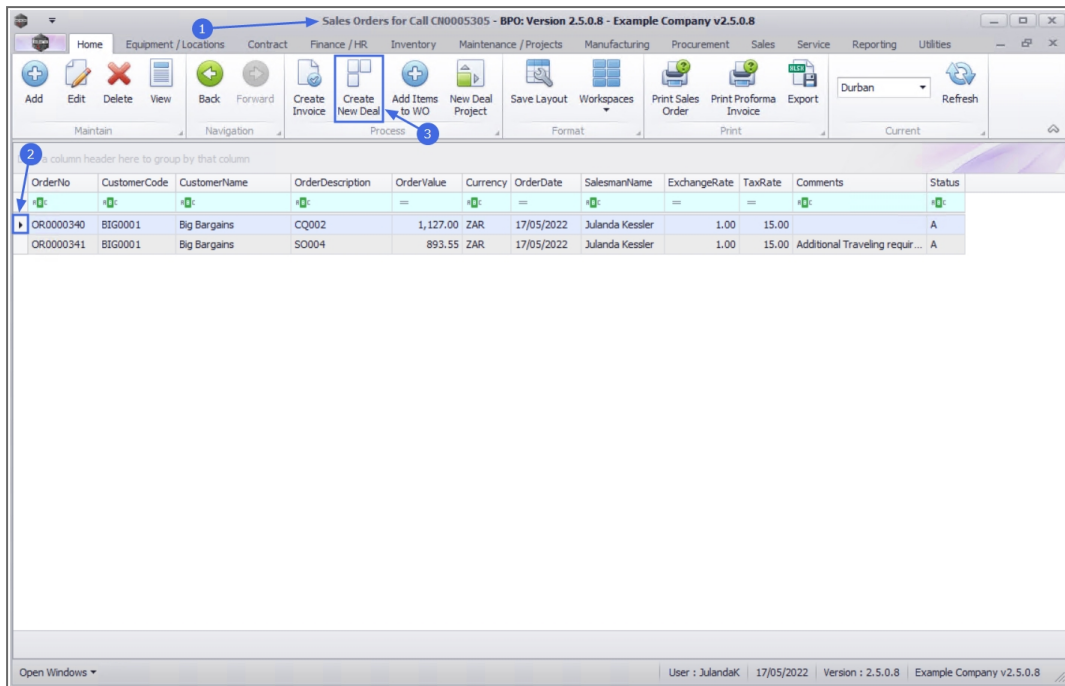


## SALES ORDER ITEMS

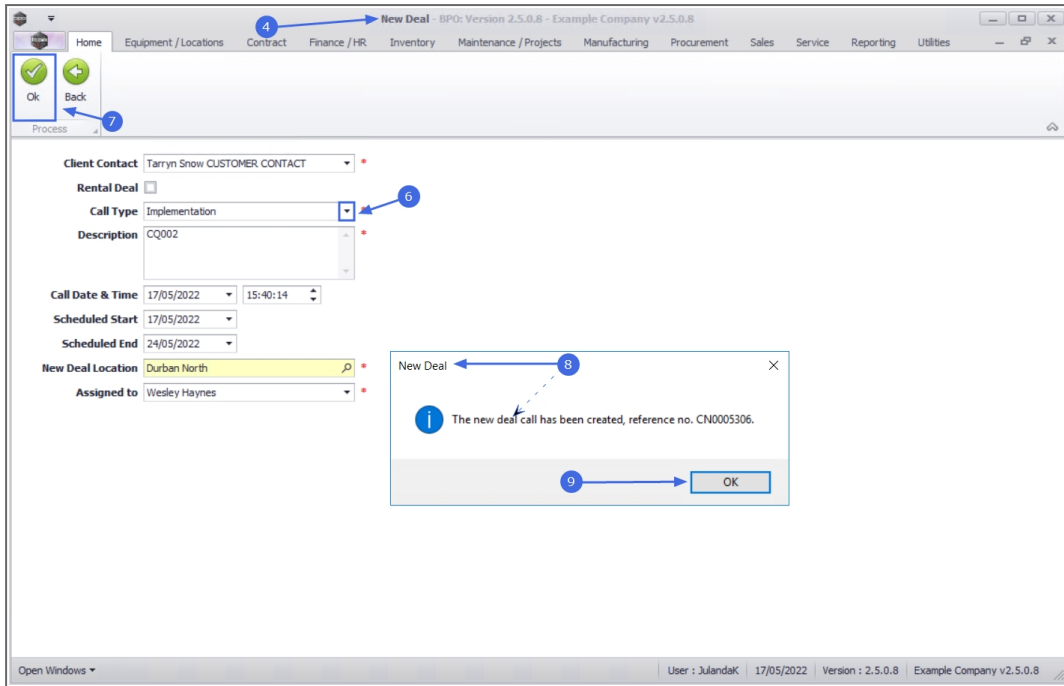
When you have completed the Sales Order; **Header**, **Financial**, **Addresses**, and **Cross Reference** frames, you can move down the screen to the **Items** data grid.

- Click on the text box below **Item Type** to reveal a drop down arrow.
- Click on this arrow to display the **Item Type menu**.
- From this menu, select one of the following:
  - **CRFT**: Labour craft, i.e. Technician
  - **CTRT** Sub Contracts / Third Party Labour/Service
  - **EXPS** Expenses
  - **INVN** Parts
  - **SERV** Internal Labour/Service
  - **TRVL** Travel
  - **WARR** Warranty

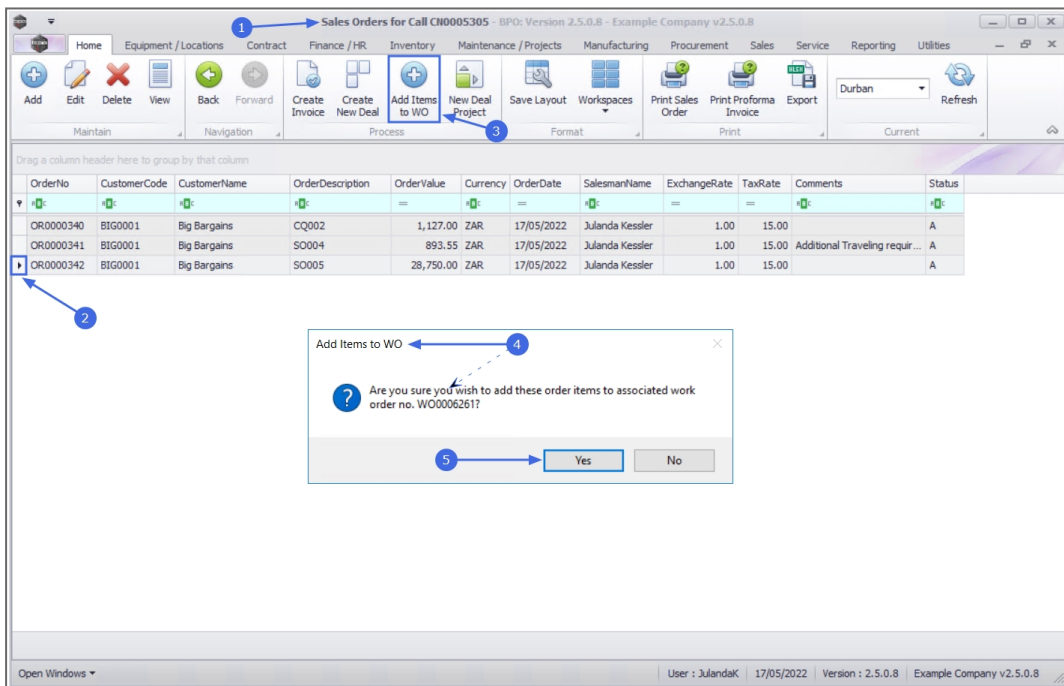
- In this example, **Parts** has been selected.



- Click in the text box below **Item Code** to reveal an **ellipsis** button.
- Click on this button to display the **Select a part** screen
  - **Note:** This **Select a [ ]** screen will always correspond with the Item Type initially selected e.g. if Labour was initially selected then the Select a craft screen would pop up.
- In this image the Item Type; **Parts** was selected therefore the **Select a part** screen is displayed.



- Click on the **row selector** in front of the **part** you wish to **add** to this **order**.
- Click on **OK**.



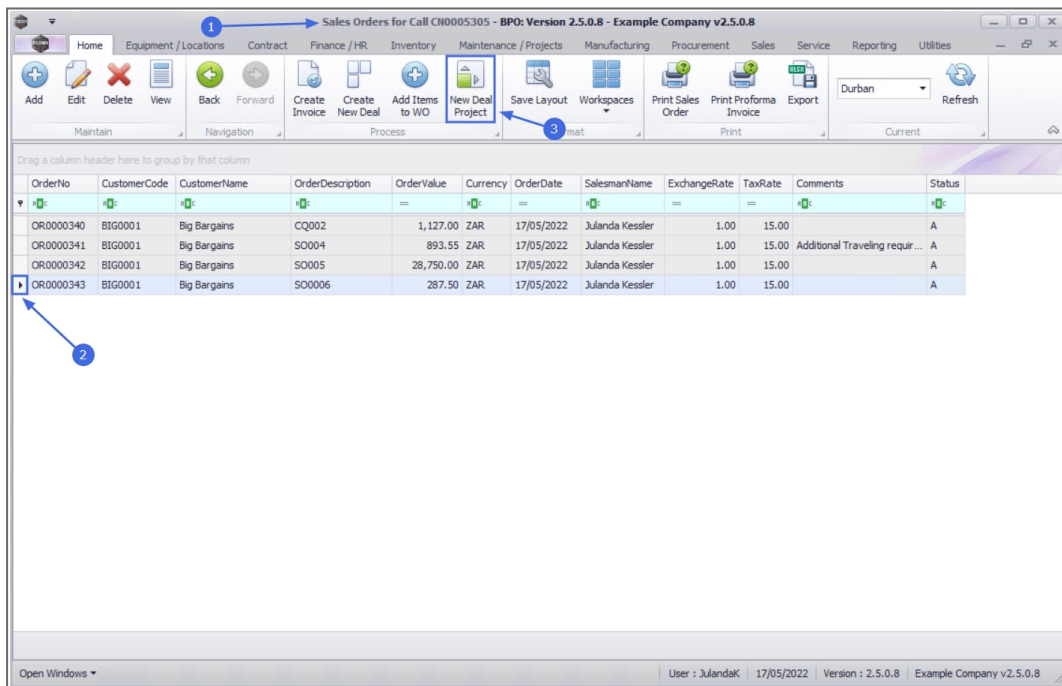
- The **Order Line Description** will now auto populate.

## Select Part Warehouse

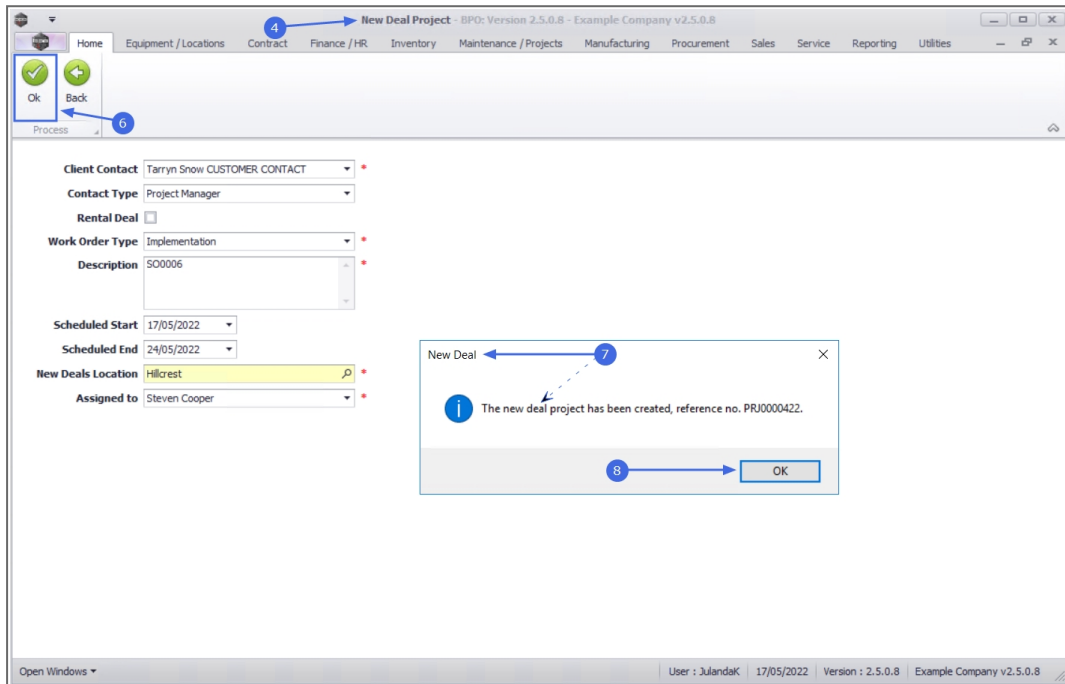
The Warehouse field should auto populate with the **default site warehouse set up on the selected part definition**. If there is no 'default' warehouse set up, then the **Warehouse Name** field will remain empty and the following **Error** message box will pop up asking;

- **The Warehouse must be specified. Do you want to correct the value?**
- Click on **Yes**.

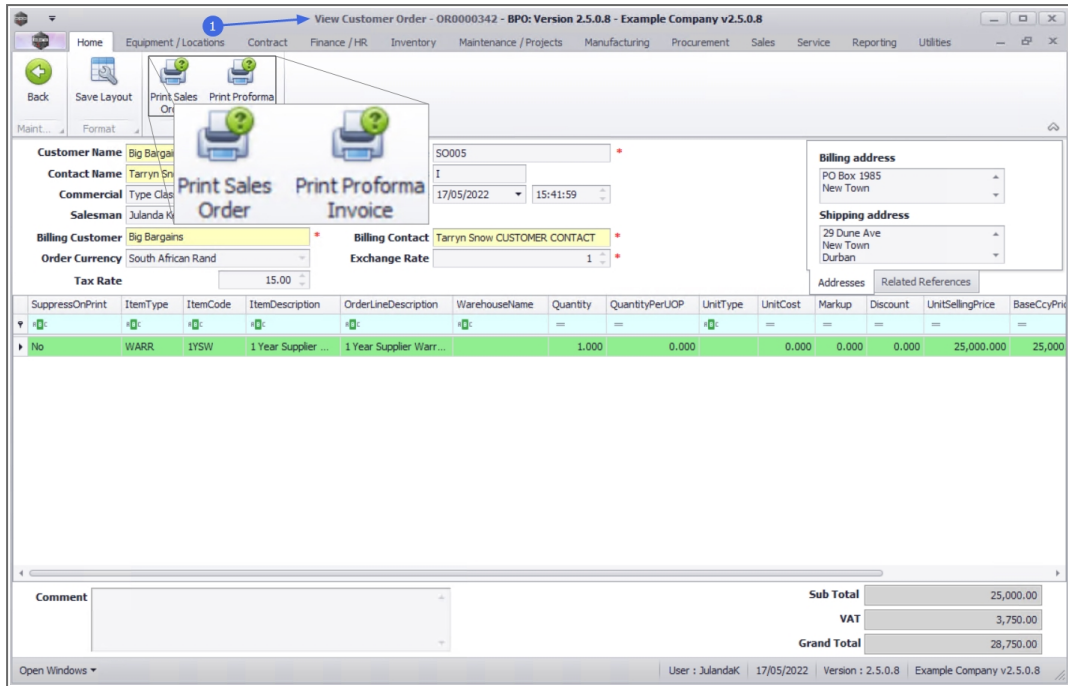
**Note:** This Error message box will only pop up if you are selecting a **part** to add to your order - it does not apply to selecting any other item types e.g. Labour, Travel etc. as they are not storage items.



- If you are adding a **part** to your order, you can now select the **warehouse**.
- Click in the text box below **Warehouse Name** to reveal an **ellipsis** button.
- Click on this button to display the **Select a warehouse for this item** pop up screen.

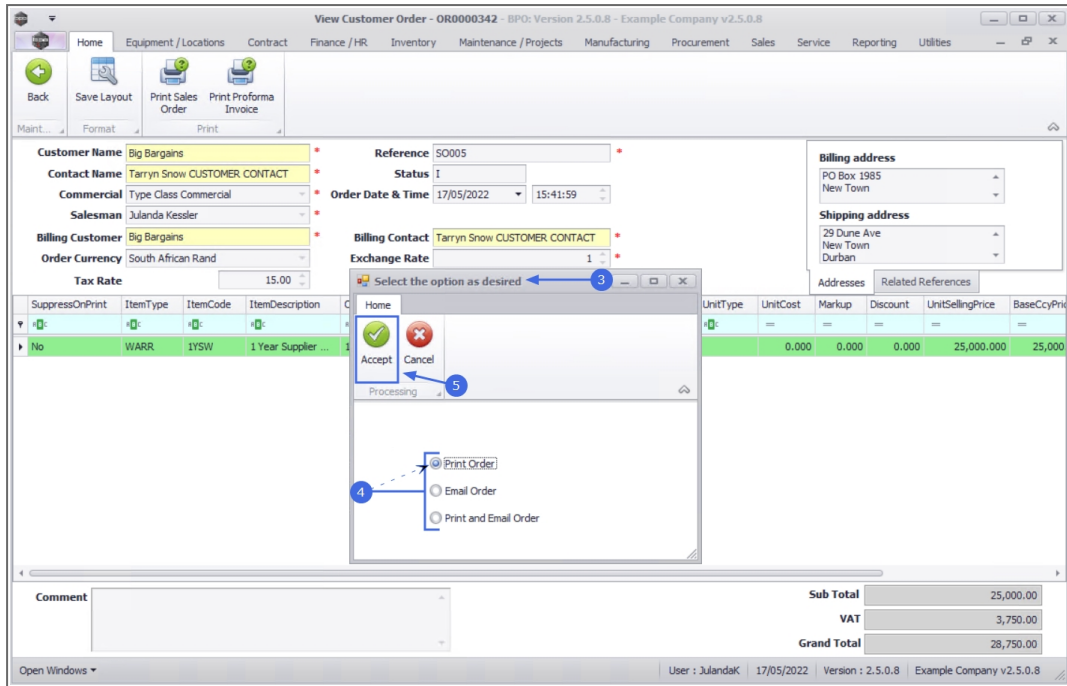


- Click on the **row selector** in front of the **warehouse** that you wish to order this part from.
- Click on **OK**.
- **Note:** Ensure that there is stock in the warehouse that you have selected.

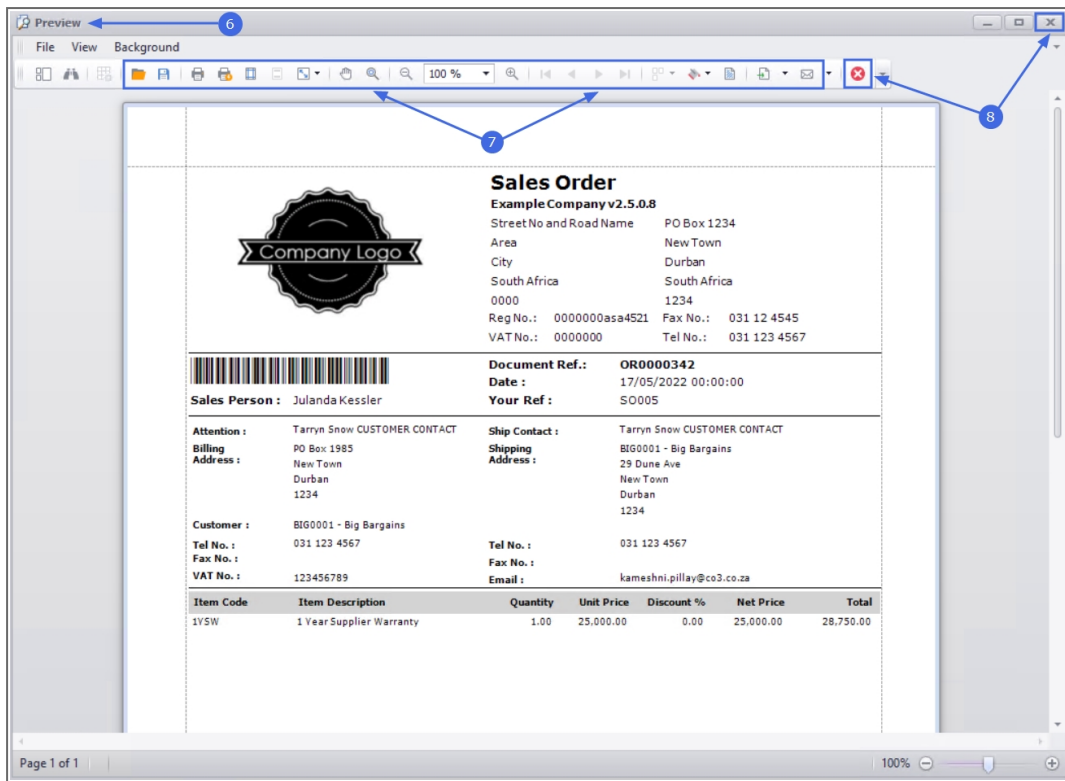


## Select Department

- Click in the text box below **Department** to reveal an **ellipsis** button.
- Click on this button to display the **Select a department for this item** pop up screen.



- Click on the **row selector** in front of the **department** that you wish to assign to this order.
- Click on **Ok**.



## Update Items

- Update the **Quantity**, **Discount** and **Unit Selling Price**, where applicable.



Add new Customer Order - BPO: Version 2.1.0.43 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Delete Item Save Layout Print Sales Order Print Proforma Invoice

Customer Name: Hope Works  Reference: Log Order from Call 507

Contact Name: Lucinda Rowe  Status: N

Commercial: Default  Order Date & Time: 08 Jan 2018 09:10:42

Salesman: Sarah Milder

Billing Customer: Hope Works  Billing Contact: Davina Rowe

Order Currency: South African Rand  Exchange Rate: 1

Tax Rate: 14.00

Billing address: PO Box 7452 Forest Hills

Shipping address: Plot 91 Leaf Road Forest Hills New Tonn

Item Type	Item Code	Item Description	Order Line Description	Warehouse Name	Department	Quantity	Quantity Per UoP	Unit Type	Unit Cost	Markup	Discount	Unit Selling Price	Base Ccy Price	Tax Rate	Status
Parts	ACR-02	Acer rollers	Acer rollers	Main Warehouse	Sales Depart...	1.00	0.00		0.00	0.00	0.00	0.00	0.00	14.00	A

Comment:

Sub Total: 0.00  
VAT: 0.00  
Grand Total: 0.00

Open Windows  04 Jan 2018

## Add a New Line

- Click on the **text box** at the **end** of the row.
- Press the **Enter** key.

- A new line will be created.
- Add a new item to the order as required by using the process explained above.
- In this image **Labour** has now been added to this sales order.

Add new Customer Order - BPD: Version 2.1.0.43 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Save | Back | Delete Item | Save Layout | Print Sales Order | Print Proforma Invoice

Customer Name: Hope Works | Reference: Log Order from Call 507  
 Contact Name: Lucinda Rowe | Status: N  
 Commercial: Default | Order Date & Time: 08 Jan 2018 09:10:42  
 Salesman: Sarah Milder  
 Billing Customer: Hope Works | Billing Contact: Davina Rowe  
 Order Currency: South African Rand | Exchange Rate: 1  
 Tax Rate: 14.00

Billing address: PO Box 7452, Forest Hills  
 Shipping address: Plot 91 Leaf Road, Forest Hills, New Town

ItemType	ItemCode	ItemDescription	OrderLineDescription	WarehouseName	Department	Quantity	QuantityPerUOP	UnitType	UnitCost	Markup	Discount	UnitSellingPrice	BaseCoPrice	TaxRate	Status
Parts	ACR-02	Acer rollers	Acer rollers	Main Warehouse	Sales Depart...	1.00	0.00		0.00	0.00	5.00	350.00	350.00	14.00	A
Labour	TECH	Technician	Technician		Technical	1.00	0.00		0.00	0.00	0.00	433.00	433.00	14.00	A

Comment: [Text Box]

Sub Total: 765.50  
 VAT: 107.17  
 Grand Total: 872.67

Open Windows | 04 Jan 2018

## COMMENTS

- Click inside the **Comments** text box and type in a relevant comment if required.

Add new Customer Order - BPO: Version 2.1.0.43 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Save | Back | Delete Item | Save Layout | Print Sales Order | Print Proforma Invoice

Maintain | Format | Print

Customer Name: Hope Works | Reference: Log Order from Call 507  
 Contact Name: Luchda Rowe | Status: N  
 Commercial: Default | Order Date & Time: 08 Jan 2018 13:27:13  
 Salesman: Sarah Milder  
 Billing Customer: Hope Works | Billing Contact: Davina Rowe  
 Order Currency: South African Rand | Exchange Rate: 1  
 Tax Rate: 14.00

Billing address: PO Box 7452, Forest Hills  
 Shipping address: Plot 91 Leaf Road, Forest Hills, New Town

ItemType	ItemCode	ItemDescription	OrderLineDescription	WarehouseName	Department	Quantity	QuantityPerUOP	UnitType	UnitCost	Markup	Discount	UnitSellingPrice	BaseCcyPrice	TaxRate	Stat
Parts	ACR-02	Acer rollers	Acer rollers	Main Warehouse	Sales Department	1.00	0.00		0.00	0.00	5.00	350.00	350.00	14.00	A
Labour	TECH	Technician	Technician		Technical	1.00	0.00		0.00	0.00	0.00	433.00	433.00	14.00	A
[Edit]															

Comment: Technician to be called out to fit replacement rollers in customer machine.

Sub Total: 765.50  
 VAT: 107.17  
 Grand Total: 872.67

## SAVE SALES ORDER

- When you have finished editing your sales order, click on **Save**.

Add new Customer Order - BPO: Version 2.1.0.43 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Save | Back | Delete Item | Save Layout | Print Sales Order | Print Proforma Invoice

Maintain | Format | Print

**Customer Name:** Hope Works    
**Contact Name:** Luchda Rowe    
**Commercial:** Default    
**Salesman:** Sarah Milder    
**Billing Customer:** Hope Works    
**Order Currency:** South African Rand    
**Tax Rate:** 14.00

**Reference:** Log Order from Call 507    
**Status:** N    
**Order Date & Time:** 08 Jan 2018 13:27:13

**Billing address:** PO Box 7452 Forest Hills    
**Shipping address:** Plot 91 Leaf Road Forest Hills New Town

**Billing Contact:** Davina Rowe    
**Exchange Rate:** 1

ItemType	ItemCode	ItemDescription	OrderLineDescription	WarehouseName	Department	Quantity	QuantityPerUOP	UnitType	UnitCost	Markup	Discount	UnitSellingPrice	BaseCcyPrice	TaxRate	Stat
Parts	ACR-02	Acer rollers	Acer rollers	Main Warehouse	Sales Department	1.00	0.00		0.00	0.00	5.00	350.00	350.00	14.00	A
Labour	TECH	Technician	Technician		Technical	1.00	0.00		0.00	0.00	0.00	433.00	433.00	14.00	A
[Edit]															

Comment: Technician to be called out to fit replacement rollers in customer machine.

**Sub Total:** 765.50   
**VAT:** 107.17   
**Grand Total:** 872.67

- The new sales order will now be displayed in the **Sales Orders for Call [ ]** listing screen.

Sales Orders for Call CN0000507 - BPO: Version 2.1.0.43 - Example Company

Home | Equipment and Locations | Contract | Finance and HR | Inventory | Maintenance and Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Add | Edit | Delete | View | Create Invoice | Create New Deal | Add Items to WO | New Deal Project | Save Layout | Workspaces | Print Sales Order | Print Proforma Invoice | Durban | New order | Refresh

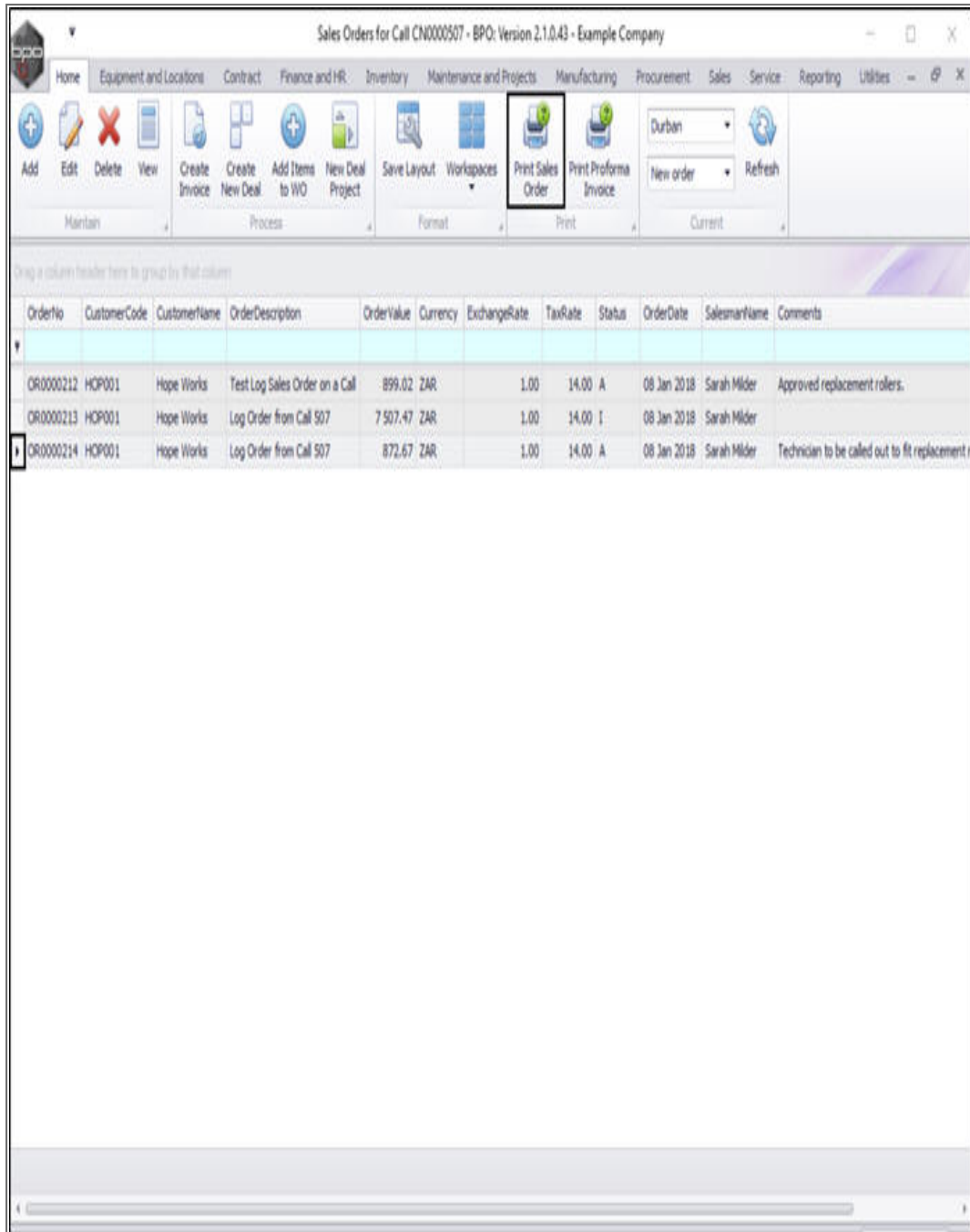
Drag a column header here to group by that column

OrderNo	CustomerCode	CustomerName	OrderDescription	OrderValue	Currency	ExchangeRate	TaxRate	Status	OrderDate	SalesmanName	Comments
OR0000212	HOP001	Hope Works	Test Log Sales Order on a Call	899.02	ZAR	1.00	14.00	A	08 Jan 2018	Sarah Milder	Approved replacement rollers.
OR0000213	HOP001	Hope Works	Log Order from Call 507	7 507.47	ZAR	1.00	14.00	I	08 Jan 2018	Sarah Milder	
OR0000214	HOP001	Hope Works	Log Order from Call 507	872.67	ZAR	1.00	14.00	A	08 Jan 2018	Sarah Milder	Technician to be called out to fit replacement rollers

## PRINT SALES ORDER

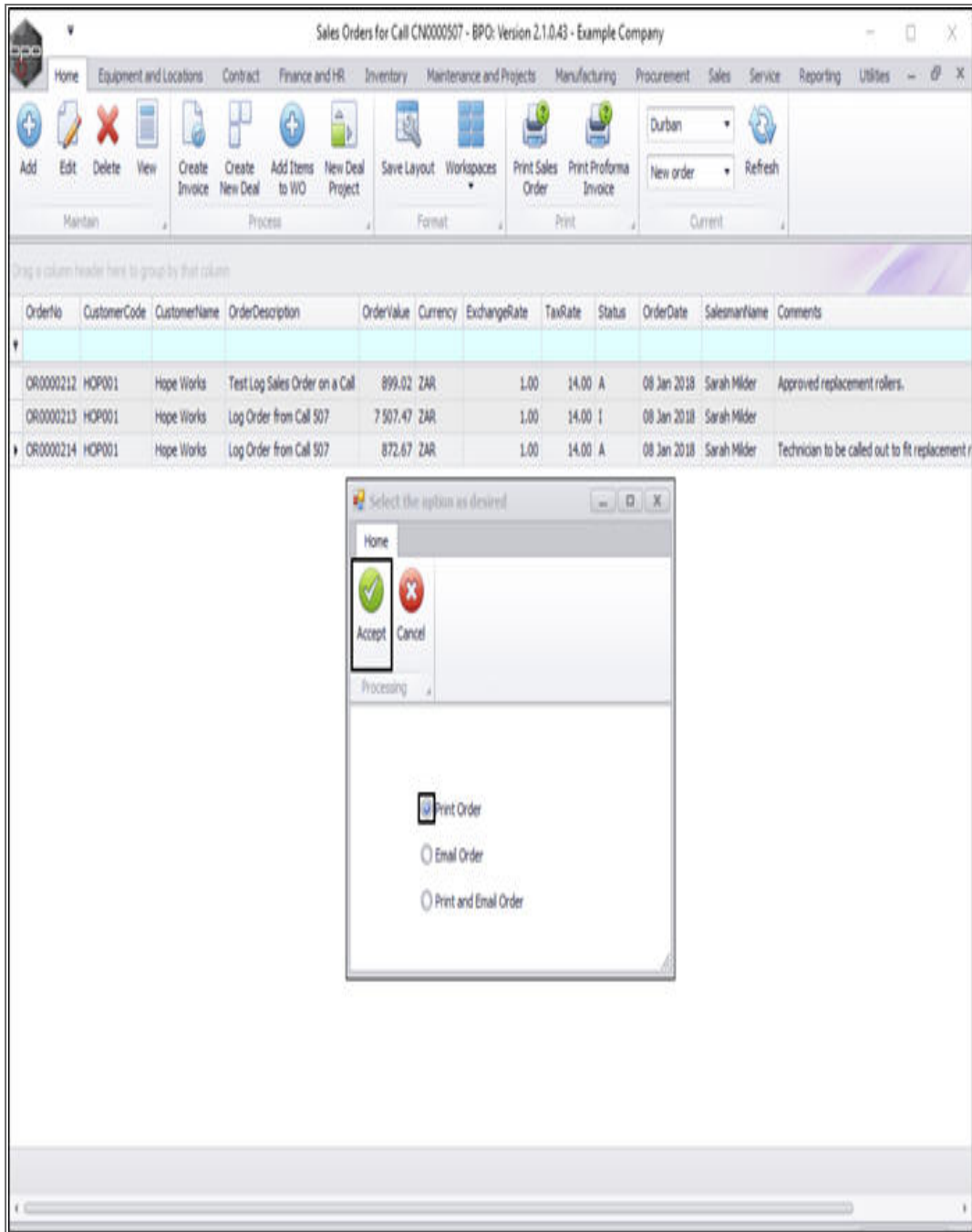
---

- In the *Sales Orders for Call [ ]* listing screen,
- Click on the *row selector* in front of the *sales order* that you wish to *print*.
- Click on *Print Sales Order*.



- A **Select the option as desired** pop up screen will appear.
- Click on **Print Order**.
- Click on **Accept**.





- The **Report Preview** screen will be displayed.
- From here you can **View, Print, Export** or **Email**.
- **Close** the Report Preview screen when done.

**Sales Order**

**Example Company**

Screen No and Head Name      Partner No

Area      Area

City      City

South Africa      South Africa

0000      0000

Reg No.: 0000000000000000      Fax No.: 000 000 0000

VAT No.: 0000000      Tel No.: 000 000 0000

**Document Ref. OR0000214**

**Date:** 08 Jan 2018

**Sales Person:** Sarah Milder      **Your Ref:** Log Order from Call 507

**Attention:** Devina Kone      **Ship Contact:** Leticia Kone

**Billing Address:** PO Box 7452  
Forest Hills  
New Town  
1234

**Shipping Address:** H09021 - Hage Works  
Riv 91 Leaf Road  
Forest Hills  
New Town  
1234

**Customer:** H09021 - Hage Works

**Tel No.:** 011 122 4547      **Tel No.:** 084 987 6543

**Fax No.:** 011 456 7890      **Fax No.:** 084 987 4321

**VAT No.:** 987654321      **Email:** lucifer@hageworks.co.za

Item Code	Item Description	Quantity	Unit Price	Discount %	Net Price	Total
ACR-02	Acet rollers	1.00	350.00	5.00	332.50	379.00
TECH	Technician	1.00	400.00	5.00	380.00	457.42

Page 1 of 1

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